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14 April 1967

MEMORANDUM FOR: Deputy Director for Intelligence
THROUGH: Director of Intelligence Support
SUBJECT: Re-examination of OCR's Role

1. We have spent some eight weeks in an intensive and extensive examination of OCR's role in the intelligence production and operations structure, doing our best to take into consideration changes we might make in our support to the Intelligence Community, the level of expertise cumulated by our production office consumers over the past years, the changing nature of the production business in the sense that it is becoming more currently oriented, and developments in the technology of the information handling trade. We have consulted at length with the users you designated, discussing the present levels of service and their needs for the future. We have looked hard at our current operations. We have carefully examined CHIVE progress to date and its chances for the future, and have tried to weigh, in general, the contributions, both current and potential, that computer applications can make to our business.

2. For the user study we divided our present activities into the smallest possible functional and regional pieces, spread these on matrices, and had each of our user representatives use these matrices in querying his colleagues as to the breadth and depth of coverage they needed from OCR. We have aggregated, analyzed, and summarized these findings as best we are able in an attempt to learn just what these principal consumers would have us do. The answers gave us rather remarkable degrees of specificity, but simple aggregation of all these bits and pieces does not produce an ordered system. Nonetheless, we can say that we did learn, in general, on both a functional and regional basis, what the areas of emphasis and de-emphasis should be.

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3. I have presented in Tab A summaries of our user findings by region, function, and office, but to be even more concise at this point, I would say we found a heavy, continuing, and indeed, probably increasing demand for detailed biographic data across the world; a lesser and regionally spotty requirement for organization and installations data; and last, a generally shallow interest in indexing subject, concept, and events information. Further, the users indicated their greatest need for support in the areas where their production activity is highest. There was no discernable trend to have OCR de-emphasize its operations in areas where production activity is high and concentrate its resources in areas where the production offices have a lesser degree of coverage.

4. The user study did not forecast major reductions in the future trend of requirements which would permit significant cutbacks in OCR manpower. Therefore, in view of the necessity to materially reduce this office's manpower needs, it is necessary for us to tackle the problem on three fronts:

a. We must develop new and less expensive methods of controlling and retrieving documentation and information. The system must be reorganized and rationalized so that economies may be found in such areas as single processing of the document flow, reduction in reproduction and filing in multiple copy, use of single vocabularies for indexing, etc.

b. Working with the principal user offices, we must develop more sensitive criteria for the determination of what is important to index and hold, and what is not, in order to cut the size of both the input and file maintenance and retrieval jobs.

c. We shall have to curtail or eliminate activities which are wanted by our customers, but are in a lower spectrum of demand than others.

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5. The above findings mean to me that we must redesign the central reference system to meet the following objectives:

- a. The system must have a high degree of sensitivity to the changing character of user requirements, must be flexible enough to permit rapid, effective accommodation to change, and must provide contingency coverage against areas of possible future interest.
- b. The system must be capable of fast response to legitimate priority requests for service but, at the same time, must be controlled to insure that the costly quick response capability is not used to service lower priority requests which can be handled by slower, less expensive methods.
- c. The system must be regulated by integrated and standardized operating procedures which minimize duplicate or redundant processing of materials entering the system.
- d. The system must be highly selective in choosing material for processing and retention, and must have reasonable, enforceable guidelines for purging itself of information too costly to store in relation to its use.
- e. The system must be capable of handling all-source reference materials in an integrated manner.
- f. The system must have provision for accommodating CHIVE in the event the test establishes the feasibility of CHIVE implementation; however, the system must be able to operate effectively by itself if CHIVE does not materialize as an effective central reference capability.

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6. To meet these objectives, we must develop a relatively inexpensive, computer-assisted indexing and retrieval system through which we can get minimal control over that portion of the document flow that we must control at all. I want to emphasize to you that by relatively inexpensive, I still envision sizeable personnel costs, because so long as we are dependent upon human reading or scanning of the documents for even the grossest form of indexing, our costs will not be cheap. We will then put the balance of our forces to work on a combination of machine-assisted and manually-supported efforts against the functions and areas of highest interest, particularly the biographic field. Although we have never had uniform coverage by subject and area, we will, in the future, stress even more the targeting of our resources against the priority needs of our customers, retaining only a minimal base control of the mass of material which will afford us a contingency retrieval service. In addition, we shall need to preserve the effective operation of our basic document services in receipt, control, storage, and dissemination, as well as minimal library selection and cataloging, reference services, and some film and photographic effort.

7. A complete reorganization of OCR is necessary to accomplish the manpower reductions desired and to reshape the service on a more minimal basis. The broad outline and objectives of the reorganization are contained in the plan attached as Tab B. While we are not settled on the details, in essence, we will posture our resources in two main groups, namely, a document delivery systems group, handling the basic document services of receipt, filing, storage, dissemination, reproduction, and machine operations, and, an information group providing indexing and information services. The latter element would be subdivided into regional, as opposed to functional, components in reasonably balanced area divisions. This reconfiguration would allow us to provide single-point, all-source service for our customers, single, or at least minimal, processing of the incoming documents, use of a minimum number of vocabularies, and the development of OCR personnel who, over time, will become more familiar with the problems of the regionally-oriented user.

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25X1 8. Testing of the CHIVE concept should go forward, in my judgment, even though the thinning of our resources will probably preclude its implementation on any large scale. Our sunk costs are so great by now, and the prospects of at least some success, reasonably bright, to make the test on [] still a good buy. This experimentation, however, will not be a prerequisite to reorganization on regional lines, nor will it substitute for the immediate development of a less costly, less complex, computerized indexing and retrieval system.

9. In summary then, I recommend the following courses of action for your approval:

- (1) That OCR be reorganized into two main groups, including the document delivery systems group and the regionally-oriented information group. In addition to the advantages cited heretofore, such an organization would shorten our span of management control at the Office level and give us a fresh look at our operations from a regional, as opposed to a functional, basis. Further, it will establish five area divisions, all working on similar problems, and thereby allow us simultaneously to experiment with different approaches and systems.
- (2) That OCR be allowed to develop a new computer-assisted indexing and retrieval system which will provide a minimum, shallow level of control over that portion of the basic document flow worth indexing at all. This system should be ready to operate within nine months, and installed as the basic processing tool within the regionally configured divisions.
- (3) That testing of the CHIVE concepts be continued in the form of the [] This element will take on the actual processing of documentation about [] so that it will not be simply an overhead experiment. In addition, certain minimum staff will have to be kept on finishing up the design phase.
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- (4) That maximum effort be made within the area divisions to allocate their effort and manpower against the areas of prime concern as indicated by the users. The basic computer-driven indexing system, mentioned in (2) above, will be supplemented by various forms of manual and machine-driven systems where necessary to enhance the control and access of biographic, organization, and other types of information.
- (5) That the concept of developing and operating a referral system be incorporated in the design of each of OCR's area divisions, and that the full cooperation of the research offices be given so that a meaningful experiment can be conducted. We have found in our discussions with users, that although many support the concept in general, their enthusiasm wanes when reduced to specific questions and people.
- (6) In line with the preceding recommendation, that OCR seek a much closer and continuing relationship with the user offices so that its services may be tailored more to their priority demands, and that more real meshing of support and production take place. This will require experimentation and participation by OCR people in the production activities of these offices.
- (7) That the DDI approve an organizational strength of [REDACTED] through at least Fiscal Year 1968, unless the Director, OCR, indicates his ability to make further reductions prior to that. Quite frankly, it is impossible to arrive at a single, statistically supportable figure that OCR must have to satisfy the demands placed upon it in the complex and diverse business. It is my feeling, however, that this is the minimum number of people I need to meet the major demands of our principal users. It represents a reduction of [REDACTED] from our strength as of last December or a cut of 23 percent. (Tab C) Should experimentation dictate that even fewer people are needed, I shall so advise you.

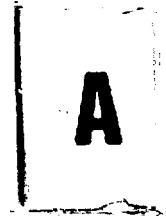
JOHN K. VANCE
Director of Central Reference

Attachment: a/s

APPROVED:

[REDACTED]
Deputy Director for Intelligence

4 May 1967
Date



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